
STATE OF INDIANA

DEPARTMENT OF LOCAL GOVERNMENT FINANCE



INDIANA GOVERNMENT CENTER NORTH
100 NORTH SENATE AVENUE N1058(B)
INDIANAPOLIS, IN 46204
PHONE (317) 232-3777
FAX (317) 974-1629

TO: Software Vendors

CC: County Assessors and County Auditors

FROM: Matthew Parkinson, Director of Data Analysis

RE: 50 IAC 26 Phase II Software Testing

DATE: June 3, 2014

The purpose of this memorandum is to provide guidance to software vendors on the logistics for Phase II of 50 IAC 26 vendor certification testing.

The Phase II vendor certification process will test the integrative functionality of the following systems of the overall property tax management system: computer aided mass appraisal (CAMA), personal property assessment, oil and gas assessment, sales disclosure, and tax and billing. In order for an assessment system or a tax and billing system to be eligible for Phase II certification, the system must first be deemed individually compliant by the Department of Local Government Finance ("Department") during the current round of Phase I vendor certification testing.

The Department plans to begin Phase II vendor certification testing in July 2014 and anticipates completing Phase II vendor certification testing by January 2015. For Phase II testing, the Department will provide the vendors the option to either demonstrate the tests in a virtual environment such as via a WebEx or a GotoMeeting session or to demonstrate the tests in person at the Conference Center of the Indiana Government Center South building. Should the vendors choose to test in person, the exact location of the testing session will be specified during the scheduling process. The testing location will be wired for internet connectivity and/or have the State's public wi-fi connection available for vendors to use. The Department will provide both a screen and a projector for vendors to use while performing the various tests. During the testing session, the Department evaluator will ask vendors to save reports that will be generated during the various tests and may ask vendors to provide screen shots of the various functions being performed. To that end, the Department recommends that vendors save the screen shots to an electronic storage device (e.g., a flash drive) and email the files to the Department evaluators at the conclusion of testing.

Per the Phase II testing scenarios that were released by the Department in March 2013, there will be four primary areas of integration demonstrated during this round of testing. They are as follows:

- Annual interface of gross assessed values from the CAMA system to the tax and billing system. Additionally, the integration of data as a result of changes in owner and billing addresses, splits, combinations, corrections of errors and assessment adjustments, and application of deductions between these two systems will be demonstrated.
- Annual interface of gross assessed values from the personal property assessment system to the tax and billing system
- Annual interface of gross assessed values from the oil and gas assessment system to the tax and billing system
- Integration of sales disclosure data to the CAMA system

In addition to these four areas, the Department will be testing the annual interface of gross assessed values for annually assessed mobile homes from the assessment system to the tax and billing system. As the Department is not certifying a standalone mobile home assessment system during Phase I testing, this particular interface will be demonstrated during the same testing session with either the CAMA system to tax and billing system interface or the personal property assessment system to tax and billing interface, depending upon the vendor. For example, if a personal property assessment system generates the MOBILE file, the Department will test the annual interface of gross assessed values for annually assessed mobile homes during the same testing session as the annual interface of gross assessed values for personal property. All assessment and tax and billing systems will be tested on their ability to generate and export the applicable required data files as referenced in 50 IAC 26-20.

The Department will be organizing Phase II testing sessions based on the four primary areas listed above. For example, CAMA system vendors and tax and billing system vendors will be paired together and asked to demonstrate the tests in Phase II that apply to their systems. Likewise, personal property assessment system vendors and tax and billing system vendors will be paired together and asked to demonstrate the tests in Phase II that apply to their systems. The same logic applies to the applicable tests for oil and gas assessment system vendors and sales disclosure system vendors. The Department will proactively coordinate with vendors whose systems are deemed Phase I compliant to verify all applicable system pairings are scheduled for Phase II testing. To that end, the Department reserves the right to propose testing session dates with vendors. Again, no individual system will be eligible for Phase II testing until it has successfully demonstrated the applicable required tests in the current round of Phase I and has been Phase I certified.

The Department is planning to allocate a total of one business day for testing each system pairing. For any system pairing deemed non-compliant, vendors may make the required correction(s) and resubmit their system for certification. The Department evaluators will compile their findings and issue their results within thirty days from the first day of a system pairing's testing. All sessions will start promptly at 9:00 AM EST and will conclude by 4:30 PM EST with an hour planned for lunch each day.

Since vendors will have already submitted the required technical and financial documents to the Department prior to the start of Phase I testing, there is no additional documentation required of vendors prior to the start of Phase II testing. However, should any of the information contained

in the originally submitted documentation be updated or otherwise have changed, the Department requests that the updated information be submitted to James Johnson at jjohnson@dlgf.in.gov. This requirement is inclusive of any release notes containing updates that have occurred to an assessment system or tax and billing system since Phase I testing. Vendors must denote proprietary and confidential information on each page that is confidential in a header, footer, or watermark.

To promote transparency with the vendor certification process, the testing reports and results will be posted on the Department's Phase II Vendor Certification webpage. Additionally, the Department will post certification letters for each system pairing. Finally, similar to Phase I, the Department does anticipate recording the testing sessions.

If you have any questions regarding this information, please contact Matt Parkinson at mparkinson@dlgf.in.gov or James Johnson at jjohnson@dlgf.in.gov.